

Engaging Volunteers

Why Use Volunteers?

- The best gifts are given by, and to, volunteers.
- Volunteers believe in the cause and want to perpetuate it.
- Volunteers are already involved in and can directly see the needs the organization is meeting.
- Volunteers have credibility with potential donors.
- Volunteers show the organization in action, providing a compelling example of what additional resources can do.

Process of Involving Volunteers

Identification – Find the right fit (past and current board members, current volunteers, key constituents).

Enlistment – Decide who is the best person for the proposed task. How and when will they be involved?

Orientation – Conduct a formal session detailing what volunteers need to know about the program and their roles and responsibilities.

Training – Provide ongoing training as appropriate to build knowledge and skills.

Support and supervision – Follow up to make sure the process is going smoothly. Provide encouragement and take corrective action when necessary.

Recognition – Thank volunteers in a variety of ways.

FINANCIAL INTERNAL CONTROLS CHECKLIST

Organizations need internal controls to ensure that policies are followed, transactions are properly authorized, assets are safeguarded, government requirements are complied with, and financial information supplied to management and to the board is current and accurate. Here are eight indicators that internal controls are adequate:

- Written up-to-date procedures covering:
 - Accounting;
 - Computer security;
 - Conflict-of-interest issues;
 - Personnel;
 - Purchasing;
 - Record retention; and
 - Travel.
- Written board-approved delegation of authority document stating which transactions each staff position is authorized to approve and which transactions require board approval.
- An annual board-approved operating budget.
- Responsibility for government filings and grant reporting vested in a staff member with knowledge of the requirements.
- Bank statements opened and reviewed by the executive director or other staff member who is not the accountant.
- Mail opened and checks logged daily by a staff member who is not the accountant.
- An annual review or audit (for organizations with budgets over \$1,000,000) by an independent auditor. The auditor reports directly to the board in executive session.
- Financial information supplied to the board at least quarterly. Board structure provides for a finance committee or treasurer who is responsible for overseeing the organization's financial management and informing the full board of any issues that arise.



Information Tracking Worksheet

INFORMATION TO TRACK	WHO NEEDS IT?	IN WHAT FORM?	WHEN?	FOR WHAT PURPOSE?	WHERE CAN IT BE FOUND?

Staff Allocation Worksheet

RESPONSIBILITY	PRIORITY	NECESSARY SKILLS	TIME FRAME (ongoing or fixed)	TIME REQUIRED	POTENTIAL STAFF	ASSIGNED STAFF Primary/ Backup